SMARTCHAIN

SMART SOLUTIONS IN SHORT FOOD SUPPLY CHAINS

Deliverable 4.2. Report on the stakeholder interviews

Work Package No. 4

EUFIC

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Executive Summary

This report presents the results of 32 expert stakeholder interviews that examine consumer attitudes, values, expectations and preferences in relation to short food supply chains (SFSC). The interviewees represented the views of consumers, producers, and other actors who work with or within SFSC (e.g., HoReCa, and certifiers) in six EU countries (DE, NL CH, HU, ES, EL), one EU region in Belgium (Ghent), and at the EU level. Consumers were generally perceived to be aware of the environmental impact of food production, although their awareness tended to be at the level of whole chain issues. There was little discussion of the social impact of food production from the point of view of consumers, suggesting that this aspect is underdeveloped. There were also regional differences, with consumers in northern European countries tending to have a greater understanding of environmental and social issues tied to food production than their southern counterparts.

Consumer understanding of SFSC appears to be in terms of local food at the regional or national level. For consumers, local food means small scale production, having a direct connection with the producer, and traditional local specialties. They have a generally positive view of local food in terms of quality and production standards, although some were thought to be concerned about food hygiene and safety. They were also considered to be concerned about the authenticity of the products, particularly consumers in Hungary, Greece, and Spain. Certification and regulation of local products would help to address these concerns.

In terms of preferences, consumers would like to shop for local food the way they shop at the supermarket: having varied food products all in one place, available all year round, accessible, and not too expensive. The relative lack of convenience and high prices associated with SFSC products (compared to products from longer supply chains) were seen as the major barriers to their purchase. Consumers, particularly those belonging to the middle-class, were thought to be willing to pay more for the taste and quality of the product. A small subset of these were considered to be willing to pay more for better production and/or animal welfare standards.

Demand for SFSC products appeared to depend on region, product type, purchase context and consumer segment, although the interviewed stakeholders suggested that increasing supply would increase demand. Consumers were thought to buy SFSC products because of health and environmental benefits, a desire to support their local community, and a preference for tradition. However, relatively few consumers purchase products regularly from SFSC. The main segments are: a) people who believe in SFSC values (SFSC advocates); b) middle class families with young children and c), elderly people.

Although trust in the food chain was cited as an issue for consumers, this concept can have multiple manifestations. For some, trust can be built on having a direct relationship with the producer, entailing the possibility of finding out more about one's food. Trust can also be based on certifications of food safety standards or regulation and monitoring of food supply chains.

More can be done to educate and engage consumers regarding SFSC, and market research is needed to inform which strategy is likely to be most effective in a particular context. Depending on the target audience, communication about SFSC can take the form of: a) providing information about the cultivation, processing and sensory and nutritional attributes of a product, b) telling the story of the producers struggles and successes with their product, c) communicating in more detail about the natural character of a product and the health benefits associated with it, d) explaining how SFSC benefits local communities, and e) raising the profile of local ingredients and dishes. Consumer engagement activities may include: farm visits/tours, allowing consumers to pick produce themselves, festivals/events promoting local food, and agritourism.

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1. Introduction

The central objective of the SMARTCHAIN project is to promote short food supply chains. The aim of Work Package 4 on food-related consumer behaviours is to investigate the social and economic aspects that drive consumers' choices and purchase decisions across different types of food supply chains, focusing predominantly on short food supply chains (SFSC). In this context, SFSC are those that consist of a minimal number of intermediaries between the producer and the consumer, whereas long food supply chains are those that involve more intermediaries. The consumer perspective has been recommended as the point of departure when designing local food supply chain strategies.[1] As part of the work package, a series of interviews were conducted with expert stakeholders in Europe representing the perspectives of consumers, producers, policy makers/policy analysts, and other actors in SFSC such as regulatory authorities and HoReCa.

The objectives of the interviews were to:

- Examine the extent to which consumers are aware of the social and environmental impact of food production
- Investigate consumer understanding of SFSC
- Elucidate the expectations and concerns that consumers have about SFSC
- Understand the consumer demand for SFSC products and determine which extrinsic and intrinsic attributes of short food supply chain products consumers value and are willing to pay more for
- Delineate the profiles of the key consumer segments that are more likely to purchase SFSC products
- Uncover the obstacles that prevent consumers from purchasing SFSC products
- Develop strategies to encourage consumers to purchase SFSC products.

The results of these interviews will feed into:

a) the subsequent Work Package 4 tasks of the consumer focus groups and consumer online study, whose aims are to examine consumer perceptions, preferences, and behavior related to SFSC, and
b) the business and policy recommendations of Work Package 7, which aim at improving the competitiveness and sustainability of SFSC.

2. Methods

2.1 Participants and study design

This research was conducted using a qualitative research design. Thirty-two semi-structured interviews were carried out with expert stakeholders representing various actors related to SFSC. Twenty-nine of the interviews were from six of the EU countries where the SMARTCHAIN case studies were based: 5 in Germany (DE), 6 in the Netherlands (NL), 3 in Switzerland (CH), 8 in Hungary (HU), 3 in Spain (ES), and 4 in Greece (EL. In addition, 2 interviews were conducted at the EU level (EU), and 1 was conducted within the municipality of Ghent in Belgium (BE). The Ghent region was selected as a best practice example due to having won a United Nations Global Climate Action Award for their urban food policy. Suitable organisations and interviewees were identified from desk research and joint network searches among the project consortium (e.g. the hubs and other project partners). Organisations representing the views of consumers, producers, and other actors who work with or within SFSC were interviewed in each case study country targeted in this research, as well as at the EU-level. The exception to this was Spain, where no consumer-related stakeholder was interviewed, as the other interviewees in Spain had already in-depth responses regarding the consumer perspective.

Table 1. Stakeholder organisations interviewed.

[1] https://enrd.ec.europa.eu/sites/enrd/files/s1_scra_factsheet-final.pdf

Region	Stakeholder	Stakeholder type/s represented
EU	European Network for Rural Development (ENRD)	Policy
	Slow Food International	Producer, consumer, retailers, HoReCa
DE	Consumer Advice Center Baden-Württemberg e.V.	Consumer
	State Parliament of Baden-Württemberg	Policy
	State Parliament of Hessen (Bündnis 90/Die Grüne party)	Policy
	Kaemena Farm	Producer, service
	Regionalfenster (Regional window) GmbH	Certifier
NL	Organic Farm Landzicht	Producer, consumer
	Philips Fruit Garden	Producer, retailer
	Sustainable Agriculture team from Province South-Holland	Policy
	Wageningen University & Research (WUR)	Policy
	Province Utrecht	Policy
	The Premonstratensian Monastery Mariënwaerdt	Producer, HoReCa
CH	Slow Food Switzerland	Producer, consumer, retailer
	University of Neuchâtel	Policy
	French Federation of Contractual Agriculture of Proximity	Producer, consumer
HU	Csoroszlya Farm Kft.	Producer
	Chamber of Tourism	Producer
	Calvary Farm	Producer
	Cooperating Balaton Upland	Service
	Upper-Heathland Rural Development Association	Service
	National Food Chain Safety Authority, Food and Feed Safety Directorate	Regulatory authority
	Pannon Helyi Termék Nonprofit Kft.	Service
	Research Institute of Agricultural Economics, Office Budapest	Policy
EL	BIOZO	Consumer
	Ecotourism Greece	Service
	GENISEA Social Cooperative Enterprise	Producer
	Hellenic Agticultural Organisation-Demeter/ Ministry of Rural Development and Food	Policy/regulatory authority
ES	(ENEEK) Basque Council for Ecological Agriculture and Food	Regulatory authority
	European Coordination Vía Campesina	Producer
	AUSOLAN	HoReCa
BE	Ghent Environment and Climate Bureau (Ghent Municipality)	Policy maker

2.2 Structure of the interviews

The SMARTCHAIN project incorporates 18 cases studies of different types of SFSC networks across 9 European countries: 2 each in Germany, the Netherlands, France, Italy, Serbia, Hungary, Switzerland, Greece, and Spain. Work Package 1 developed the conceptual framework for the comparative analysis of the case studies, which involved in-depth interviews with members of the case study networks. The insights from these case studies formed the basis of the interview guide used in this study. The interview questions were designed to examine: a) challenges and opportunities for SFSC, and b) perceived consumer acceptance of SFSC products. In order to examine these issues with respect to consumers' perspective, all stakeholders were asked the following open questions:

1. In your opinion, how aware are consumers of the social and environmental impact of food production?

2. What do you think consumers understand about short food supply chains or local foods?

3. How do you think consumers perceive SFSC/local foods?

4. Do you think that there is much demand for local foods from consumers? Why?

5. What do you think are consumers' greatest concerns when it comes to SFSC?

6. What challenges are faced by short food supply chains when it comes to consumers?

7. What do you think would increase consumer engagement with SFSC?

8. What product attributes do you think consumers are willing to pay more for?

In addition, stakeholders who did not represent consumers were asked additional questions tailored to their stakeholder type (e.g. 'Why do you think that some [producers/HoReCa outlets] are engaged in SFCS, whereas others are not?'; 'What challenges do producers/HoReCa/policy makers face when it comes to SFSCs?'; and 'What are the opportunities for producers to increase their business in SFSCs? What would make it easier/more attractive for them to do so?'). Some stakeholders were also asked specific questions related to the organisation interviewed and its work (e.g., 'Which initiatives has [interviewee organisation] started to support SFSC? Which ones have been more effective?').

2.3 Interview procedure

Each partner interviewed the relevant stakeholders of their own country in the local language, except for the EU and BE stakeholders, who were interviewed in English. Potential stakeholders were contacted via email to ask if they wished to participate in a stakeholder interview for the SMARTCHAIN project, for which they would receive a summary of the results. Those who accepted to participate were subsequently emailed the interview questions, an information sheet about the study and a consent form in advance of the interview, allowing them the opportunity to prepare their answers and read the terms of the interview. Interviewees were required to give informed consent, either by signing hardcopies of the consent form during the interview or emailing signed electronic copies of the consent form [see section 4.2 of the Appendix for a template of the information sheet and consent form].

The interviews took place between the months of June and September in 2019. Each interview took between 17 and 120 minutes to complete. Of a total of 32 interviews, 17 were conducted face-to-face, 12 were conducted via telephone, and 3 interviewees answered the interview questions via email. With the exception of the interviews conducted by email, all the interviews were audio-recorded with the consent of the interviewee and transcribed in the original language. The transcriptions were sent to each of the interviewees for approval. Once the stakeholder approved the document, it was translated into English and sent to the task leader (EUFIC).

2.4 Data analysis

A database with all the translated interviews was created in Microsoft Excel.™ A first coding process was performed by the lead researchers in order to identify the main themes. Some of the themes were based on the questions themselves (e.g., consumer awareness of the environmental and social impact of food production), and other themes emerged indirectly from the interview responses (e.g., specific consumer segments). Although the interviews also covered business and policy issues related to SFSC, these topics will be covered more in-depth in the deliverables of WP7. Instead, this report focuses on the consumer aspect of SFSC, and relates this briefly to business and policy implications where appropriate. A selection of quotes from the original raw data are included in this report with the aim of exemplifying some of the ideas behind the themes.

3. Results and discussion

This section first details the stakeholders' views on consumer understanding of the context in which SFSC are situated. The point of departure is at the broad level of the social and environmental impact of food production, before exploring how consumers are thought to conceptualise SFSC. This is followed by an analysis of how consumers are perceived to relate to SFSC, in terms of their expectations and concerns, leading into a discussion of whether there is much consumer demand for SFSC products, what attributes consumers value about such products, and their willingness to pay for these particular attributes. However, it emerged from the interviews that the extent to which consumers are considered to value the attributes of SFSC and their willingness to pay can vary greatly according to consumer demographics, basic values, and their interaction with the purchase context. Thus, a section on consumer profiles details which segments of consumers are more or less likely to purchase products from SFSC and the reasons for their behavior. Finally, we develop strategies for targeting consumers via communication and marketing methods in order to increase their engagement with SFSC and purchases of SFSC products. Furthermore, a table of problems and solutions derived from the interviews can be found in Section 4.3 of the Appendix. Section 4.4 of the Appendix shows a table of initiatives related to SFSC as mentioned by the stakeholders.

3.1 How aware are consumers of the social and environmental impact of food production?

In order for consumers to be able to contextualise the role of SFSC and appreciate their significance, they need to have some understanding of the social and environmental impact of food production. Documenting the extent of their awareness of these issues can also facilitate the design of communication strategies targeted towards consumers.

Stakeholders opinions were divided on how aware consumers are about environmental issues related to food production, however there was a general consensus that such awareness is increasing. It is interesting to note that the social impact of food production was barely discussed. This suggests either that stakeholder awareness of the environmental impact of food production outweighs or overshadows their awareness of the social impact, or that stakeholders perceive that consumers' awareness of the environmental impact is greater than awareness of the social impact. This may partly be because the environmental impact of food production is universally applicable, the cause and effect relationships involved are relatively straightforward, and thus it is easier to communicate a coherent message that is relevant to all stakeholder groups. By contrast, the social implications of food production can vary greatly, and are affected by a greater range of factors and competing interests– from local dairy farmers going bankrupt due to cheaper imports,[2] to foreign fruit pickers being exploited in Southern Europe.[3] Because the social implications of food production are different for different stakeholder groups, it may be difficult for consumers to receive clear, consistent messages about these issues.

Consumer awareness about environmental implications appears to be at the level of whole chain issues, such as single-use plastics and carbon dioxide emissions. Their degree of awareness appears partly related to the complexity of the issue. For example, it seems that it is easier for consumers to understand the concept of "0km" than to understand the connection between climate change and food issues (such as the impact of meat consumption). They have simplified views often provoked by campaigns and the big stories, but few take the extra effort to find out the detail behind the stories. For instance, it was suggested that consumers would buy organic food because they were told that it was better for the environment, although it may be the case that meat produced from exclusively grass-fed animals is better for the environment. Similarly, it was thought that consumers may consider that genetically-modified food is bad for the environment, without being able to explain why.

Consumers in north-western European countries such as Germany, the Netherlands and Switzerland were perceived to have a greater understanding of social and environmental issues than those in southern Europe, and fair trade and organic food was considered to be increasingly popular in these countries. Although these consumers are interested in buying organic food, they are not aware of how organic means different things for different product types, such as fish, meat, and fruits & vegetables. In Switzerland consumers may be more aware of issues surrounding food production because in 2018 two referendums were introduced in Switzerland calling for: a) constitutional changes ensuring that Swiss consumers have greater access to locally-produced, healthy and organic food and b) fair wages for people working in the agricultural sector. However,

[2] Marie-Laure Augère-Granier (2019). *The EU dairy sector*. European Parliamentary Research Service Briefing http://www.europarl.europa.eu/RegData/etudes/BRIE/2018/630345/EPRS_BRI(2018)630345_EN.pdf

[3] https://www.france24.com/en/20170616-video-reporters-modern-day-slaves-migrants-workers-exploited-fruit-pickers-spain-italy

a Swiss stakeholder noted that although consumers may be knowledgeable about the issues surrounding food production, it is still difficult for them to choose what to buy because there are so many criteria that could be taken into account (e.g., the environment, the social conditions of workers). Even if one were to adopt one criterion for decision-making, such as environmental impact, it is not clear whether it is better to choose a product that is local but not organic, versus, one that is grown organically but comes from further away. This conundrum is illustrated by the results of a study[4] conducted by the Flemish government on sustainable food that found that although 50% of Flemish consumers know what sustainable food is, when choosing in the store, freshness and price prevail as the decisive factors. Only 27% take sustainability criteria into account when purchasing food.

By contrast, it is perceived that consumers in southern countries such as Italy, Spain and Greece are more concerned about whether the products are seasonal, locally-produced and specific to their geographical area, as exemplified by traditional products such as those carrying the labels of Appellation d'origine protégée (AOP), Protected Designation of Origin (PDO) or Protected Geographical Indication (PGI). This approach may have its origins in the Mediterranean diet of these regions which emphasises traditional food, production methods, agricultural practices and seasonality.[5] Stakeholders considered that when consumers do have concerns about the environmental impact of food production, they are often linked to anxiety over negative health implications (e.g. in Greece and Italy).

Beyond consumers, there is a growing awareness amongst other citizen groups (such as children and young adults) of the environmental impact of food production. For example, environmental awareness courses are taught in Greek schools as part of the standard school curriculum and it has boosted awareness about food production and related health issues[6]. As a result, children and their parents are often more aware of the social and environmental impacts of food production than other consumer segments. This growing awareness among young people led the Slow Food movement to develop the Slow Food Youth network [see the table of initiatives in Section 4.4]. This youth branch has a greater emphasis on the environmental impact of food production, as opposed to the gastronomic focus of the original Slow Food network. One EU-level stakeholder noted that "sometimes at an institutional level, the drive for change is about what kind of production and market citizens want to see, rather than the ones that are currently paying for it by going out and spending their money… So citizens are the ones who are likely to change institutions, whereas if you're in the food business it's consumers who change what you do." [7]

3.1 Summary of key findings about consumer awareness of the social and environmental impact of food production

- Consumers have varied understanding of the environmental impact of food production:
  - Many understand whole chain issues such as single-use plastics, organic food, and $C0_2$ emissions
  - Consumers in northern European countries tend to have a greater understanding of environmental and social issues tied to food production
  - Consumers in southern Europe are more concerned about traditional, local specialities
- Consumer understanding of the social impact of food production appears to be underdeveloped

[4] Environment Ministry of Flanders (2017). https://www.lne.be/onderzoek-milieuverantwoorde-consumptie-2017, retrieved October 30, 2019.

[5] Mediterranean diet, https://ich.unesco.org/en/RL/mediterranean-diet-00884, retrieved 1/10/2019

[6] Kimionis, G. (2007). An analysis of the Effectiveness of Environmental Education Centres: The views of local coordinators for environmental education. *Higher Education and the Challenge of Sustainability: Problems, Promises and Good Practice*, *5*, 89.

[7] One prominent example of this is the climate activist Greta Thunberg: https://www.ted.com/speakers/greta_thunberg

3.2 Consumer understanding of short food supply chains

According to the stakeholders, consumers generally have little understanding of the concept of SFSC, which appears to be a concept that is more formalised in industry and among those involved with SFSC. Instead, SFSC products are more commonly subsumed under the concept of local food. This may be because local food and SFSC share many principals, although SFSC includes more dimensions, such as the number of links in the supply chain or fair market systems, which rarely figure in consumers' image of local food. Another distinction between local food and SFSC that consumers appear to be generally unaware of is that local food is geographically proximal, whereas some products from SFSC may be sourced relatively far away, but still respect the SFSC definition of few intermediaries – such as producers selling their products to consumers online, or a restaurant in the Basque Country sourcing oranges from Valencia or bananas from the Canary Islands. Understanding of SFSC also varies by consumer demographics, as will be discussed in section 3.5 on consumer profiles.

Although there is no standard understanding among consumers of what local food is, the image they have is generally centred on: a) the origin of the product, and b) buying directly from the producer, which supports the transparency of the supply chain and the authenticity of the food. Consumer understanding of local food may also differ depending on the product type (e.g. fresh produce vs. processed food) and the region in question (an urban vs. rural area).

Consumers' concept of local food is bound more by regional or national borders, rather than in terms of geographical distance. This suggests that their understanding and affiliation with their food system may be based on their level of social identity rather than the concept of food miles. Local food is perceived as that which comes from one's country (e.g., by consumers from Flanders, restauranteurs in Budapest), region (e.g., by consumers from Flanders, and Germany), or even village (by consumers from Hungary). For example, approximately 60% of Flemish people consider regional products and/or Belgian products to be local, whereas only 13% of Flemish people consider European products to be local.[8] The geographic distance associated with SFSC is relative, and can depend on where the consumer lives. A stakeholder in Spain suggested that a distance of 150km may be considered local, whereas in Hungary SFSC cannot exceed 40km by law outside the area of Budapest. Another stakeholder in Switzerland pointed out that because of the size of the country and the geography, food supply chains are often even shorter, on the scale of "very local". This entails that SFSC products are relatively prevalent in Switzerland (compared to other countries) making this concept more salient in the mind of Swiss consumers. Consistent with this, another Swiss stakeholder pointed out that the local aspect of a product is often highlighted in marketing from producers and restaurateurs.

What aspect of the product the origin applies to is also not clear-cut. Some consumers understand that the issue of origin applies to the original product, for example in the case of bread this refers to the grain, and whether it comes from a local cultivation. Some other consumers believe that the place of processing defines whether it is a local product or not. For others, it is enough if the baker is local and bread and bakery products are not produced elsewhere. These types of questions are of increasing concern in countries such as Germany, where one certifier of local food, Regional Fenster GmbH, lists on their label both the origin of the main ingredient(s) and place of processing. Concern for the origin of the food is also an increasing trend in Greece, where some larger supermarket chains have introduced the indication of origin on their private labels.

In Hungary, Switzerland, and Greece the consumer idea of local food is also thought to reflect food that can be directly purchased from the producer (e.g. market or agricultural community), thus benefiting the producer directly. Similarly, in the Belgian area of Flanders, local markets are the most well-known and most frequently

[8] Environment Ministry of Flanders (2017). https://www.lne.be/onderzoek-milieuverantwoorde-consumptie-2017, retrieved October 30, 2019.

used form of SFSC, followed by direct sales on the farm.[9] Capitalising on this association with the producer, there is an increasing trend to put the farmers' name and contact information on the private labels of large supermarket chains (Greece), or the face of the producer on the product packaging (Spain). For consumers in Greece, local food is also associated with small-scale farming and its environmental benefits. In Hungary, there is also an emphasis on tradition in local food, as reflected in artisanal products (e.g., jam, syrup, honey, wine, spices) and festivals that celebrate regional specialties – e.g., the Plum festival, or onions from Makó.

There was a strong consensus that consumers generally perceive local food in a very positive light. However, sometimes they are confused about what exactly is good about local products. They are unaware that local production does not necessarily mean that the product is more natural or environmentally friendly. Some stakeholders pointed out that some supermarkets advertise local food for products that are industrially produced, and that some local foods do not use organic production methods. However, as with their level of understanding about the environmental impact of food production, consumers are generally not sensitive to these nuances. The exception to this is Switzerland, where, perhaps because the Food Sovereignty Initiative has raised public awareness on the values of SFSC, there are ongoing discussions about the finer details related to SFSC. This has led to a greater understanding of the danger of SFSC disappearing because of legislation or difficulties in land ownership. Furthermore, because production standards are more demanding in Switzerland than in the exporting countries from which Switzerland buys, there is a perception that Swiss non-organic may be superior to European organic products. The confidence that consumers have in their national produce is also apparent in the Netherlands, where Dutch products are seen as more reliable than those from other countries, although this national sentiment does not appear as strong in Hungary, where it was pointed out that historically Hungarian products were less reputable.

Stakeholders did tend to agree that the knowledge on SFSC is increasing, prompted by awareness-raising initiatives. These initiatives range from in-store marketing highlighting local products, documentaries about the financial struggles of local farmers shown on public television sparking public debate on local media (Flanders), to a Hungarian national campaign promoting the Year of Local Food (2015).[10] It was noted, however, that awareness and interest are likely to vary according to socioeconomic status. Stakeholders mentioned that consumers who struggle to afford healthy food, and/or who shop at discount supermarkets are less likely to be aware of SFSC or their implications.

In conclusion, consumers generally have little understanding about SFSC, but there is a growing interest in this concept. This suggests that there is an opportunity to promote SFSC amongst consumers by educating them about the advantages of SFSC. A more developed discussion of education strategies will be elaborated upon in section 3.6 on communicating and marketing strategies.

3.2 Summary of key findings about consumer understanding of SFSC

- Consumer understanding of SFSC:
  - is tied to the concept of local food
  - focuses on the origin of the food, the direct connection with the producer, the small scale of food production, and traditional local specialities
  - is primarily positive, but sometimes confused with associated the concepts (e.g., organic, 0km)
- There is a need to educate consumers about SFSC, but it appears that those with a higher SES are more likely to be open to this

[9] Coart, Johan. Short chain unleashes opportunities [Korte keten ontketent opportuniteiten]; https://www.farmcafe.be/artikel/12872. Retrieved 1/10/2019
[10] http://www.helyboljobb.hu/

3.3 Consumer expectations and concerns related to short food supply chains

How consumers perceive local food and/or SFSC is greatly influenced by the mainstream alternative of shopping at supermarkets. When purchasing local food, consumers would like to have the same services offered in supermarkets (clean stalls with fruits and vegetables neatly arranged, etc.). They tend to generalise their experience with the mainstream offer to all food, so that they expect SFSC products to be available all year round rather than being less predictable in their supply (whether due to seasonality or to other climate/market fluctuations). Consumers also want to be able to access a larger range of produce than that which is produced by SFSC. Part of this is in terms of buying food that is not local to a region (e.g., tropical fruits, peppers and tomatoes), and part of this is in terms of being able to buy a wide range of different products (e.g., fruit, vegetables, meat, dairy, bread) all at one place. Often purchasing from SFSC entails buying a limited range of products from a specific place, such as a farm or a collecting point, which may be considered to be an obstacle.

Consumers also expect that SFSC products should have some similar characteristics as those from longer chains – such as a large size or flawless appearance – although this expectation is gradually becoming more realistic as their knowledge and experience with organic food and food from SFSC increases. Given that these superficial attributes can influence willingness to pay, it may be worth continuing to educate consumers that aesthetically compromised produce is still good quality. Consumers should also be made aware that the demand for cosmetically perfect fruit and vegetables is harmful to the environment, leading supermarkets to reject 10-16% of farm crops and causing farmers to overproduce as a result.[11]

Perhaps the most influential point of comparison between products from long and short food supply chains is price. Stakeholders in Hungary, Spain and Greece point out that most consumers do not want to pay more to buy from SFSC than to buy from the supermarket, however, the number of consumers who are conscious about the value of local food is increasing. Although the price for local food is cheaper with direct selling than with longer chains, the price point of the mainstream supply at supermarkets is still the most obvious benchmark for consumers. One potential solution could be to lower the price of SFSC products by eliminating value-added tax (VAT) for direct selling. Another alternative is to implement a tax that takes into account the hidden costs of food in terms of its environmental and/or health impact. This could be in the form of true pricing[12] or a scheme that decreases the rate of tax for labour, but increases it for the cost of resources and pollution.[13] Whether the cost of food from SFSC should be exempt from VAT, or the cost of food from longer chains should be increased, may depend on current rates of VAT and the percentage of income that is spent on food, which varies between countries. For instance, the VAT in Hungary is 27%, and in 2018 consumers in Hungary spent 18.1% of their household expenditure on food and non-alcoholic beverages. By contrast, in Germany the VAT on food is 7% (compared to 19% for most goods/services in Germany), and Germans spend 10.8% of their expenditure on food an non-alcoholic beverages.[14] Thus, in countries such as Hungary it may make more sense to eliminate/lower the VAT rate for food from SFSC than it would be in countries such as Germany.

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[11] FEEDBACK (2018). Farmers talk food waste: supermarkets role in crop waste on UK farms. https://feedbackglobal.org/wp-content/uploads/2018/08/Farm_waste_report_.pdf

[12] https://sustainablefoodtrust.org/articles/hidden-cost-uk-food/. Retrieved 07/11/2019

[13] https://ex-tax.com/

[14] Eurostat (2017). http://appsso.eurostat.ec.europa.eu/nui/show.do?query=BOOKMARK_DS-423035_QID_674B0D1C_UID_-3F171EB0&layout=COICOP,L,X,0;GEO,L,Y,0;UNIT,L,Z,0;TIME,C,Z,1;INDICATORS,C,Z,2;&zSelection=DS-423035INDICATORS,OBS_FLAG;DS-423035UNIT,PC_TOT;DS-423035TIME,2017;&rankName1=UNIT_1_2_-1_2&rankName2=INDICATORS_1_2_-1_2&rankName3=TIME_1_0_1_0&rankName4=COICOP_1_2_0_0&rankName5=GEO_1_2_0_1&rStp=&cStp=&rDCh=&cDCh=&rDM=true&cDM=true&footnes=false&empty=false&wai=false&time_mode=ROLLING&time_most_recent=false&lang=EN&cfo=%23%23%23%2C%23%23%23.%23%23%23

Some stakeholders also mentioned that consumers sometimes expect local food to be organic, which is consistent with research showing that consumers often use these terms interchangeably[15]. This may occur because there is a considerable overlap of consumer values underlying willingness-to-pay overlap for organic and for local attributes.[16] Lack of consumer clarity about production methods also extends to the processing of food. For example, some consumers perceive reconstituted apple juice to be more 'pure' than cloudy apple juice, when the reality is that the latter is less processed and healthier[17]. Or consumers do not appreciate the difference between the two types of juices because they both carry the label of 100% juice.

Consumer perceptions of local food and/or SFSC chain products also appears to be subject to regional differences about the authenticity of the product. Stakeholders generally felt that consumers have a positive opinion of such products, in terms of quality and production standards. However, the issue of fraud in SFSC was raised as a particular concern of consumers in Hungary, Greece, and Spain (and to a lesser extent, Germany and the Netherlands), where it seems that products from longer supply chains are sometimes sold as local products, and there is no certification system and lack of monitoring to safeguard consumers against deceptive practices.

It was suggested that another solution to this problem is to have a certified quality label/scheme for local food. Although some countries have a multitude of such regional labels, having one unified scheme (such as for the EU organic label) would help to reduce consumer confusion about the different schemes that exist. If this is not possible, trying to find harmony between the different certifiers/schemes would also help, such as in the case of the Fair Trade label, where there are many certifiers under the one label. The issue of multiple labels was identified as a particular problem in Germany, where the proliferation of labels (over 1000 regional labels) means that there is much variability between credible seals, untrustworthy seals and marketing seals. This can be confusing for consumers, who often cannot distinguish between certified and uncertified labels[18], leading them to think that they are purchasing regional food when they are not. One label/scheme would also help consumers to identify local food more easily, which has been reported as a particular problem for consumers.[19] To consolidate consumer trust, SFSC should also be well regulated and controlled. Ensuring these standards and safeguards can help to justify the premium price of local products.

However, it is worth noting that the more a product is processed and the more ingredients it is comprised of, the more difficult it becomes to judge the extent to which a product still has local origins.[20] One stakeholder from Germany suggested that the products for which local traceability can best be ensured are fruit, vegetables, fresh meat, cured meat, cheese and jam. Traceability could be communicated to the consumer via QR codes on the products, which allow access to information about the origin of the product, production method, nutritional information, carbon impact, etc.

[15] Campbell, B. L., Khachatryan, H., Behe, B. K., Dennis, J., & Hall, C. (2014). US and Canadian consumer perception of local and organic terminology. *International Food and Agribusiness Management Review, 17*(1030-2016-82975), 21-40.
[16] Meas, T., Hu, W., Batte, M. T., Woods, T. A., & Ernst, S. (2014). Substitutes or complements? Consumer preference for local and organic food attributes. *American Journal of Agricultural Economics, 97(4)*, 1044-1071.
[17] Oszmianski, J., Wolniak, M., Wojdylo, A., & Wawer, I. (2007). Comparative study of polyphenolic content and antiradical activity of cloudy and clear apple juices. Journal of the Science of Food and Agriculture, 87(4), 573-579.
[18]European Commission (2019). Assessment of voluntary claims on fishery and aquaculture products (FAPS) https://op.europa.eu/en/publication-detail/-/publication/78fd2eb2-7b71-11e9-9f05-01aa75ed71a1/language-en/format-PDF/source-97519624

[19] European Commission (2013). Report from the Commission to the European Parliament and the Council on the case for a local farming and direct sales labelling scheme, https://op.europa.eu/en/publication-detail/-/publication/be106719-60e5-11e3-ab0f-01aa75ed71a1

[20] To address this issue, the European Commission has adopted new legislation under the Regulation on food information to consumers (FIC). This legislation, which comes into effect 1 April 2020, stipulates that the origin of the primary ingredient in a food product must be indicated if different from the origin of the product in order to not deceive consumers and to harmonise the presentation of such information. https://ec.europa.eu/info/news/commission-adopts-new-rules-labelling-origin-primary-ingredients-food-2018-may-28_en

One major concern that consumers were thought to have was about food hygiene and safety. The products of the long supply chains may be considered to be more reliable, because there is certainty that the products are accredited and controlled at checkpoints. By contrast, there is often no information like that regarding products of short food supply chains. This presents an obstacle particularly for HoReCa, who are legally bound to comply with food safety standards. It was pointed out that currently SFSC in Spain are not prepared to show that they comply with the standards demanded by HoReCa – either through lack of certification, or through ignorance of the relevant standards. Thus, educating SFSC producers about food safety regulations and making it easier for them to be certified may help them to increase their market. In addition to the usual food production safety standards such as ISO 14000, ISO 22000, and HACCP, there are also ones that are specifically targeted to SFSC producers. One type of food safety certification for local food is SALSA - Safe and Local Supplier Approval food-safety standard [see the table of initiatives in Section 4.4 for more information]. This UK certification is written by food safety experts to reflect both the legal requirements of producers and the 'best practice' expectations of professional food buyers, thus helping small producers to supply directly to local retailers and caterers. Therefore, it appears that although having a direct connection with the producer in SFSC can help to create a relationship of trust, in some cases this is not enough to replace confidence in hygiene and food safety standards that are taken for granted in the longer food chains. As one stakeholder in the Netherlands pointed out, some consumers prefer certification because they need this assurance and value product information. Other consumers, however, do not perceive the added value of certification and are happy to regularly buy SFSC products without certification.

3.3 Summary of key findings about consumer expectations and concerns

- Consumers' expectations of shopping for SFSC products is based on their experience of shopping at supermarkets:
  - They want the price of SFSC to be comparable to that of the mainstream offer
  - They want a wide range of SFSC product types
  - They expect a reliable supply of SFSC products
  - They expect SFSC produce to be presented in the same way as mainstream products
- Consumers often conflate local and organic food
- Consumers generally have a positive view of local products
- Some consumers have concerns about the authenticity/origin of the product (particularly in HU, EL, ES)
- There is also a concern about food hygiene safety in SFSC, from HoReCa as well as consumers
- Certification and regulation of local products would help to address consumer concerns

3.4 Consumer demand and willingness to pay for short food supply chain products

Stakeholders across countries generally agreed that the demand for products from SFSC is much less than that of the mainstream offer, being somewhat a niche market. They also agreed that demand is increasing, although there was some variability in perceptions of whether consumer demand for SFSC products exceeds supply. Many stakeholders claim that demand is greater than the existing supply (Germany, Spain, Switzerland, Hungary), although is sometimes specific to a region or to a type of product. For example, some producer stakeholders in Hungary mentioned that the demand for local food is greater in Budapest than in rural areas, and one mentioned that there is not enough local meat supplied. Related to this, chefs have difficulty accessing local products in Budapest, and the quantity and quality of local products does not meet their expectations. Thus, further research is needed to obtain a more comprehensive picture of the extent to which consumer demand is being met, and for which types of products, and in which areas. Another example cited relating to supply and demand difficulties is the case of community-supported agriculture (CSA), where the producer is required to keep up with the demand of consumers who have already signed up to their scheme. In this case, both the demand of filling regular individual orders and distributing them can be challenging for the producer.

The ratio of demand to supply also depends on how saturated the existing market is. Because the market is driven by consumer demand for diversity, demand will exceed supply in markets that are more homogenous in their product types, where there is little product specialisation. Demand is also more likely to be greater in more affluent areas where consumers can better afford products from SFSC, such as Western Europe compared to Central Eastern Europe. Higher demand can also be expected in more populated areas (such as urban vs. rural areas) and touristic destinations, as there are more consumers to buy the SFSC products.

> "There is a growing demand…but we need more points of sale. Creating supply also creates demand."
>
> *Ghent Environment and Climate Bureau*

Several stakeholders also pointed out that demand can also be driven by supply. That is, the more available and accessible SFSC products are, the more consumers will buy such products. Stakeholders suggested that more points of sale are needed to drive consumer demand, particularly in supermarkets, and to a lesser extent, restaurants. Many consumers do not buy local food because they have the idea of seeking out local food, but rather, they are simply responding to the available offer.

Product type plays an important role in influencing consumer demand. Stakeholders across countries emphasised that much of the attraction of SFSC products is that they offer something different from the mainstream offer. As such, consumers tend to be more interested in products such as regional specialties (e.g., asparagus from Valais in Switzerland), and quality "gourmet" products (e.g., wine, preserves), rather than ordinary products such as milk and carrots. Some consumers are conscious that local supply chains can support the maintenance of atypical products and specialties (such as "forgotten" or heirloom vegetables), thereby supporting the diversification of supply by fighting against the standardisation of products. This principle also applies to supplying restaurants, where the variety of the product also matters. As one stakeholder in Hungary pointed out "Demand and supply often don't meet. The producer starts to produce any kind of potato, but there is no demand in a restaurant market." Thus, producers need to conduct their own market research to find out what the consumer wants, and/or what type of consumer is more likely to buy their particular type of product. For instance, in Flanders there is a demand for eggs and processed products such as dairy and bread, in addition to fruit and vegetables from SFSC[21].

There was a strong consensus across countries that consumers are willing to pay more for the taste and quality of the product. These attributes may be associated with the product being a regional specialty, and with the product being seasonal, and therefore at its peak taste. Local products are also considered to be fresher (because they have travelled a shorter distance and so are sold sooner harvest), and harvested when they are ripe, thereby ensuring the full nutrient content on the product. Natural products that are minimally processed are also be valued. For example, for Flemish consumers, the most important criteria for purchasing food, in addition to price, are the regional, seasonal and natural character of the food.[22] For processed products, it was claimed that consumers value traditional production methods (particularly in Greece and Hungary) and are more willing to pay for products with a taste award. This underlies the principle that consumers are willing to pay

> "Consumers will not only pay for local food, but for the benefits these products offer, particularly the health-related aspects. The social-environmental aspects are harder to communicate directly."
>
> *GENISEA Social Cooperative Enterprise*

[21]Coart, Johan. Short chain unleashes opportunities [Korte keten ontketent opportuniteiten]; https://www.farmcafe.be/artikel/12872, retrieved 1/10/2019

[22] Coart, Johan. Short chain unleashes opportunities [Korte keten ontketent opportuniteiten]; https://www.farmcafe.be/artikel/12872, retrieved 1/10/2019

more for a recognised brand that has performed well. It was highlighted that a greater willingness to pay tended to be a characteristic of more middle-class consumers.

A smaller subset of consumers and chefs were seen as being willing to pay more for better production standards, such as produce grown organically or with minimal use of pesticides, and better animal welfare standards, such as free-range farming and keeping animals on short transport routes to abbatoirs. Organic or pesticide-free products were considered to be particularly valued by consumers and restaurants, both for their health and environmental benefits. Indeed, some stakeholders suggested that in many cases the organic aspect of products take precedence over other characteristics related to its provenance. It was also considered that consumers are only willing to pay more for organic products that are certified.

It was also suggested that consumers would pay more if they knew that the farmer’s livelihood was improved through SFSC, as this benefit is particularly appealing to consumers, but it appears to be less well advertised. In restaurants that serve local food, willingness to pay is not just about the product itself, but also the creativity of the chefs in transforming local products into dishes, and how the staff treats the clients. Thus, it appears that much of what consumers value about local food is unrelated to the social and environmental benefits specific to SFSC.

What consumers are thought to value about SFSC is that there is a direct relationship with the producer. This addresses the growing desire for consumers to know where their food comes from and how it was made, as it provides them an opportunity to ask questions about the products. Knowing who the producer is, and the story behind their product, allows consumers to feel that they can trust the product and the way it was produced. However, this type of trust can also be supported by certificates of authenticity related to the attributes and production methods of the product, which some stakeholders suggested that consumers would also be willing to pay for.

For consumers who are concerned about animal welfare, being able to visit a farm and seeing how the animals are raised further reinforces this trust relationship. It is for this reason that the authenticity of the product is particularly important to consumers - they want to know that the product is genuinely local, and not a wholesaler pretending to be local. In this respect direct selling may represent more convincing evidence of this than selling through an intermediary.

Sourcing food directly from the producer also allows consumers to fulfil their value of supporting local farmers and the local economy. However, it is worth noting that demand is not considered by some stakeholders as being high enough to attract consumers with the short-chain story alone. That is, local products need additional selling points such as their quality to appeal to consumers. It was also pointed at that the attributes that consumers are willing to pay more for in SFSC products are those that apply to products from longer supply chains as well, such as the product having health benefits, a special/traditional taste, and having an attractive appearance, whether derived from the physical attributes of the product itself (e.g., a large size, a beautiful colour), or its packaging (such as a more traditional look, or a more ‘premium’-looking packaging).

Another selling point of local products can be found in the context of agritourism, where local products become another way for travelers to experience a local culture. It was acknowledged in Greece that demand for local products is increasing in the agritourist sector. As with ordinary consumers, it was thought that part of this demand is due to awareness about climate change and the realisation that local food is fresher and tastes better. But more specific to agritourism, greater interest can also be attributed to increasing curiosity about local flavours as consumers’ palates become more sophisticated, and a desire to connect to the local culture and live the local experience (e.g. on a farm). As such, demand for local food among hotels is also increasing in order to keep up with the evolving tastes of tourists.

Another context that fosters particular consumer demand is that of local food in schools. To the extent that local food is perceived to be healthier and of better quality (particularly organic), parents who have the financial means would be willing to spend more to have their children eat healthier, local food at school. Although those living in less affluent areas would also welcome such food, they are less able to afford local products, and so may not be willing to pay more for them.

3.4 Summary of key findings about consumer demand and willingness to pay for SFSC products

- SFSC products is a niche market dependent on market differentiation
- Demand is variable and depends on region, product type, and purchase context
- Consumer demand is driven by market offer
- Need to increase points of sale
  - Most consumers do not buy from SFSC even if they may intend to – increasing accessibility would increase demand
- Having a direct relationship with the producer increases trust and transparency
- Consumers also value supporting the local economy/farmers through purchasing SFSC products
- Consumers are willing to pay more for taste, quality, and health benefits particularly if they are associated with awards/certification

3.5 Consumer profiles

This section first describes the profile of consumers that purchase products regularly from SFSC, followed by those that tend not to buy regularly from SFSC. Only a relatively small percentage of consumers purchase local food with any degree of regularity: this was estimated to be 1% (e.g., Belgium), <10% (e.g., Netherlands). Within this group there are consumers who consciously choose local products because they believe in the principles of SFSC, and there are those who choose for another reason that appeals to them. Consumer motivations underlying purchases from SFSC include **environmental and health concerns, a preference for tradition, and wanting to support the local community**. Some of these motivations may underlie purchase behavior independently of values related to SFSC. For example, some consumers who aim to reduce exposure to pesticides (for health and/or environmental reasons) may buy organic food from both long- and SFSC. Similarly, those who prefer traditional methods and products may be just as likely to buy from a market at the end of a longer food supply chain as that from a SFSC.

In addition to the values that drive behaviour, there are also consumer resources that can facilitate purchases of SFSC products. Because these products are relatively inaccessible and expensive compared to the alternative mainstream offer in supermarkets, the availability of time and money makes it easier for consumers to purchase SFSC products. Consumer demographics overlay both values and resources, such that certain demographic groups possess the values and resources associated with buying SFSC products more so than do others.

SFSC advocates ("Locavores"). The segment of consumers who believe in the principles of SFSC is seen as being relatively small, compromising a "small percentage of a small percentage" of people who actually buy SFSC products. This segment is embodied by the "conscientious, responsible consumer, who gives value to the sustainable product from a social, economic and environmental point of view, committed to the producer receiving a fair price for his product. He is also concerned about healthy food." (stakeholder from University of Neuchâtel). They are essentially "locavores" who support local food because: a) they believe that that local foods are superior in taste and quality, b) they are opposed to long food supply chains, and c) they in building and supporting one's own community or local communities more generally.[23] These types of consumers are more likely to maintain their engagement with SFSC initiatives that require more commitment, such as community supported agriculture (CSA). Such consumers are also less demanding in their expectations of food from SFSC, for example, being more accepting about the limited choice they have from CSA. As one producer of a CSA initiative in the Netherland explains "They give us unconditional support and let our land determine their menu. They don't ask themselves if our products fit their wishes."

Main consumer groups. The two main consumer groups that were identified across several countries as being the main purchasers of SFSC products are **families with young children** and **the elderly**. Consumer research in Flanders shows that **in terms of families, it is particularly those of a higher SES and those with young children**, who traditionally vote for the green party and/or are more interested in environmental initiatives.[24] This is comparable to research showing that those who buy organic foods tend to have higher education levels, and belong to married households or households with young children.[25] The fact that these families tend to be of a higher SES suggests that the level of education and/or affluence may be underlying their motivation. This can be contrasted with a point mentioned by a stakeholder in Spain that, due to the economic crisis, families with lower-middle income give more importance to price than SFSC values when purchasing groceries.

Another reason why families may be interested in SFSC is because they can **offer attractive/educational experiences to their children**. For example, in Switzerland, it was noted that families often take their children to local markets and farms where the public can pick their own produce – in this way children from the city can experience how food is produced in the field. Another common explanation given for the interest of families in SFSC was that families preferred to feed their children food from such sources for **health reasons**, because it was better quality and often cultivated with fewer chemicals. Indeed, it was suggested by many stakeholders in different countries that parents would be willing to pay more to have their children fed from SFSC in nurseries and schools. This is consistent with an observation made by a stakeholder in Greece that, health-conscious consumers who can afford to pay something extra are those who buy SFSC products on a regular basis. Another reason could be that children are increasingly being taught about the environment in schools, which may have a spillover effect onto their family.

In contrast, elderly people appear to have quite different motivations for buying products from SFSC. Their engagement appears to be supported by their lifestyle, as older consumers have the tradition of buying directly from the producer, and they have more time to visit multiple producers to source the range of products they require, and the time to prepare meals from locally-sourced products, as such products tend to come in the form of raw ingredients rather than ready-made meals. In Hungary it was also mentioned that this segment seeks products that have are traditional in taste and production methods, and that their motivation stems from a sentimentalism about local products.

In Hungary (and perhaps in more rural areas), the motivation for buying local food can be conflated with the motivation of buying from local markets, as both these behaviours allow consumers to easily ask questions about the product. It was pointed out that this direct avenue to the producer is also valued by consumers who are particularly concerned about ingredients, such as young parents, and those with food allergies.

It is worth noting that supporting the local community was considered to be an important motivation for purchasing SFSC products. This applies not only to purchasing directly from producers, but also from intermediaries such as local butchers or grocers. As one EU-level stakeholder noted, "it's about the sentiment,

[23] Reich, B. J., Beck, J. T., & Price, J. (2018). Food as ideology: Measurement and Validation of Locavorism. *Journal of Consumer Research*, *45(4)*, 849-868.

[24] https://www.vlam.be/public/uploads/files/feiten_en_cijfers/bistro/korte_keten_2018.pdf. Retrieved 01/10/2019

[25] Dimitri, C., & Dettmann, R. L. (2012). Organic food consumers: what do we really know about them? *British Food Journal, 114(8)*, 1157–1183.
Paul, J., & Rana, J. (2012). Consumer behavior and purchase intention for organic food. *Journal of Consumer Marketing*, *29(6)*, 412–422.

the emotion, about helping someone locally rather than giving money to something that has come 14 steps in the supply chain." However, this value was not associated with a particular demographic segment.

There are also particular consumer groups who engage with SFSC for reasons unrelated to conventional SFSC values or resources. One group that was mentioned is migrants, who may purchase esoteric ingredients specific to their culture that they can only source directly from producers (e.g. spices, raw milk). However, it was pointed out that migrants tend to shop at farmers markets rather than use methods, such as teaming up with other consumers to buy from different farmers, with the products being delivered at a pick-up point. This may be because at markets prices are lower for certain types of products, and it is a more traditional way of purchasing.

Another group consists of tourists, who appear to have various motivations for buying local products. A stakeholder in Hungary mentioned that tourists seek local products as gifts to bring back home, rather than as a way of helping the local economy. These types of consumers are attracted to high quality products that look and taste good. In this case product packaging plays an important role in helping to increase the sales of SFSC products. A stakeholder working in agritourism in Greece further differentiated tourists in relation to their interest in local products. Greek tourists who travel locally in their country seek out local products because they understand the value of local sourcing. Foreign tourists who spend less on their travels (and who tend to join package tours in areas such as Laganas, Zakynthos), appear to have little interest in local cuisine, preferring instead food that is more familiar to them. To cater to such tourists, many supermarkets in Zakynthos stock British-made yogurt and even bottled water from the UK. Foreigners who spend more on their travels in Greece are more likely to be interested in local food and agriculture, staying in green hotels that increasingly emphasise local food, and smaller rural properties, or eco-/ agri-tourist guesthouses. Tourists with a particular focus on food tend to travel as couples, have higher education, and spend more than other cultural tourists.[26]

One recurring theme thus far is that those of a lower SES are less likely to purchase local foods. However, in Germany, there is a trend towards discounter supermarkets trying hard to attract regional suppliers and label regional products. It may be that if SFSC products can be made accessible to consumers under these business models, then more consumers would purchase such products.

Consumers who do not buy local products. As alluded to previously, most consumers do not regularly buy products from SFSC. This may be because, according to the stakeholders, most consumers prioritise price and accessibility when it comes to grocery shopping.

Some of these may not do so because they are unaware of the benefits of SFSC products, perhaps due to lack of education, and/or lack of interest in the issues related to SFSC. People may also feel that the SFSC are less relevant for them if they are not exposed to SFSC (e.g. if they live in urban areas with few farm shops), or if they consider the price of SFSC products to be prohibitive.

Nevertheless, it seems that many consumers who do not buy regularly from SFSC are aware of at least some of the benefits of products from SFSC, and they often intend to buy more healthy/sustainable food. However, their purchase decisions are more often driven by price and/or convenience. Products from SFSC tend to be less convenient than those from longer supply chains in several ways:
i) being seasonal products, they are less available all year around, and so require more consideration in terms of meal-planning,
ii) they are available in fewer retail outlets, particularly those that are most popular with consumers – e.g., supermarkets and discount retailers, and so require more effort to source

[26] Smith, S. & Costello, C. (2009). Culinary Tourism: Satisfaction with A Culinary Event Utilizing Importance-Performance Grid Analysis. *Journal of Vacation Marketing*. *15 (2)*. 99-110.

iii) they undergo less washing and cutting than produce from longer supply chains, and so require more effort to prepare
iv) they are more often in the form of raw ingredients rather than semi-prepared or ready-made meals that are popular amongst consumers
v) SFSC suppliers offer a more limited range of produce than at popular retail outlets, thus consumers would need to source from several SFSC suppliers to meet their weekly grocery needs

Thus, it appears that SFSC products are not as compatible with consumers' modern lifestyles as products from longer supply chains are. This may account for why even consumers who believe in the values of SFSC often shop from both types of chains. This suggests that education about the benefits of SFSC and price reductions of SFSC products can only have a limited effect on consumer behaviour if the convenience of buying and using SFSC products is not improved.

To increase the convenience of buying from SFSC, producers could form cooperatives offering a larger range of different products types (fruit, vegetables, fresh meat, delicatessen meat, dairy, and bread). This would allow consumers to satisfy more of their grocery requires at one place. This solution is more targeted than a market, where is there greater competition within the same product type, or against competitors with greater volume.

"…When distribution is well organised, more people are reached and stimulated to buy local foods. This makes it easier to change behaviour, which creates more demand."

Sustainable Agriculture team from Province South-Holland

Another way of increasing the convenience buying of SFSC products would be to offer them online with home delivery, or delivery to a local pick-up point. For smaller producers, this option may be more feasible within a cooperative structure. However, it is worth noting that the culture of cooperatives varies between countries. For instance, Italy has strong cooperation culture in producing the same types of crops, whereas it was suggested that in Switzerland producers cannot agree on pricing and opening hours for direct selling. Willingness to cooperate also depend on the producers' goals, as some producers do not see the advantage of cooperation. Thus, the regional context also needs to be taken into account when deciding upon a business model.

It is also worth noting that, in Flanders, even consumers who buy SFSC at least once a month tend not to travel more than 5 kilometers for this.[27] This suggests that having more accessible retail channels is key to increasing the sales of SFSC products, such as those at central locations or at large stations. Similarly, supplying large retailers such as supermarkets with SFSC products would boost the visibility of these products and address the problem that consumers often do not know where they can purchase local products[28]. Furthermore, consumers would also have more confidence in the hygiene and safety of the products based on the standards of the large retailer. Thus, integrating SFSC products into the normal routine of consumers via their placement in supermarkets will make it easier for buying local products to become a habit. It would also ensure that these products are accessible to all types of consumers.

[27] Coart, Johan. Short chain unleashes opportunities [Korte keten ontketent opportuniteiten]; https://www.farmcafe.be/artikel/12872, retrieved 1/10/2019
[28] European Commission (2013). Report from the Commission to the European Parliament and the Council on the case for a local farming and direct sales labelling scheme, https://op.europa.eu/en/publication-detail/-/publication/be106719-60e5-11e3-ab0f-01aa75ed71a1

3.5 Summary of key findings about consumer profiles

- Consumers are motivated to purchase SFSC products mainly because:
  - They are concerned about the environment
  - They are concerned about health
  - They like traditional products
  - They want to support the local community
- Compared to the mainstream offer of products, SFSC products require more time, money, and effort to purchase and consume. Thus:
  - Most consumers do not buy from SFSC even if they may intend to
  - Consumers with more time and money are more likely to purchase SFSC products
- Relatively few consumers purchase products regularly from SFSC. The main segments are:
  - People who believe in SFSC values (SFSC advocates)
  - Middle class families with young children (they are concerned about health, the environment, and they have financial means)
  - Elderly people (they like traditional products and have the habit/time to buy directly from producers)

3.6 Communication and marketing strategies for increasing consumer purchase of short food supply chain products

In the previous sections various strategies for increasing the purchase of SFSC products were discussed, such as selective taxing, increasing points of sale, and certification of local food [see Section 4.3 of the Appendix for a summary table of problems and solutions]. This section will elaborate on strategies for targeting consumers more specifically through marketing and communication, based on the foregoing discussion of consumer perceptions, needs, values, preferences, and profiles.

Although consumers have a growing awareness of the environmental impact of food production, it appears that they generally know relatively little about its social impact, suggesting that communication about this aspect of SFSC can be improved. However, because consumers are interested in supporting their local community specifically, the social impact of food production should be communicated at the local level, as this is likely to instil a greater sense of personal relevance for the consumer. As one German producer explained "We tell people at the farm festival or during farm tours that our milk is now collected by a tanker truck and taken to Freiburg to the processor of Black Forest milk, and if you then buy Black Forest milk in a shop, we benefit directly from it. When people hear that, many start buying only Black Forest milk. It must be clear that the producers benefit if the advertised products are bought." Governments also have an important role in this communicating about SFSC, as they have a large audience, and the means and the channels to inform the public about farmers' stories and local markets. This can occur at the local level (e.g., Ghent in Belgium), the regional level (e.g., Baden-Württemberg in Germany), or the national level (e.g., Hungary [see Section 4.4 for examples of SFSC initiatives from the governments of these areas].

> "Narration can create affiliation – you are more willing to pay if you have an emotional interaction, if you know that the producer lives nearby and if you and the producer are part of the same local system."
>
> *Slow Food International*

How the story of the producer or their product can be conveyed depends upon the target audience and the purpose of the communication. Consumers who are interested in transparency and who care about how their food is produced may value the type of label that the organisation Slow Food proposes, which indicates the origins of the product (the territory) and includes cultivation techniques, processing, preservation methods, and, the sensory and nutritional attributes.[29]

However, consumers who are less concerned about the characteristics and implications of food production may be better engaged when presented with information about local producers in a storytelling format, involving "a detailed, character-based narration of a character's struggles to overcome obstacles and reach an important goal."[30] This type of framework has been shown to more effectively motivate pro-social[31] and pro-environmental[32] behaviour (in the form of donations) than information that is not framed as a coherent story. As one producer in the Netherlands remarked "I suspect that we receive more understanding if something is not satisfactory, because we tell our story; the positive and the less positive aspects. It creates more insight in the cultivation (difficulties) which leads to more appreciation from the consumers when we hand a box of fresh, organic products from our land over to them."

Such a narrative format can also be applied to informing consumers more generally about the problems presented by longer food chains, and how individuals can help to solve these problems by buying SFSC products, and the impact that this can have on producers, the local community, as well as one's health and the environment. This type of approach should help to justify to consumers why the price of SFSC products are higher than those from longer chains. In this way, the conversation surrounding food choice becomes less about price and more about value and impact.

Communication also needs to address consumer expectations about the range of food available locally and the seasonality of produce. Raising the profile of dishes using local, seasonal produce (e.g., by promoting local recipes) may help consumers to feel more confident to replace their usual dishes that use ingredients sourced far away with those that are more regional. This may involve emphasising the local food culture and agricultural conditions to help consumers feel more connected with their territory.

Another aspect that consumers value is the naturalness of food products, with the 'natural claim' becoming one of the leading label claims on new food products in the EU.[33] Thus SFSC producers should highlight this attribute of their product, while explaining what it is about their product that makes it 'natural' (e.g., cultivation method, minimal processing, no additives).

It is important for producers to be able conduct their own market research, because different products in different regions attract different consumer types. This can be as simple as keeping track of which products are the most popular, asking customers about their preferences and why they purchase particular products. For producers who have online sales, market research could involve tracking consumer profiles and behaviour via Google Analytics and Facebook. To reduce the burden of marketing, different SFSC producers could pool their marketing resources together (e.g., sharing a library of images, marketing templates), or such resources could be provided by organisations supporting SFSC or rural development. Low-cost marketing to consumers can occur via social media platforms such as Facebook and LinkedIn.

Once the most relevant consumer segment/s are identified, producers can develop more targeted marketing strategies. For example, having recognised that families with children are a key consumer segment for SFSC, many producers are offering family-friendly options such as activities with childcare at farmers markets, and a pancake restaurant (instead of a culinary restaurant) on the farm premises.

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[29] https://www.fondazioneslowfood.com/en/what-we-do/what-is-the-narrative-label/

[30] Haven K.F. (2007). Story proof: the science behind the startling power of story. Libraries Unlimited, Westport, CT

[31] Barraza, J. A., Alexander, V., Beavin, L. E., Terris, E. T., & Zak, P. J. (2015). The heart of the story: Peripheral physiology during narrative exposure predicts charitable giving. *Biological Psychology*, *105*, 138-143.

[32] Morris, B. S., Chrysochou, P., Christensen, J. D., Orquin, J. L., Barraza, J., Zak, P. J., & Mitkidis, P. (2019). Stories vs. facts: triggering emotion and action-taking on climate change. *Climatic Change*, *154*(1-2), 19-36.

[33] Ingredion. (2014). The clean label guide in Europe. Retrieved from http://www.alimentatec.com/wp-content/uploads/2014/10/The-Clean-Label-Guide-To-Europe.pdf. Retrieved 14/10/2019

> "You have to differentiate in order to attract a wide audience. It is not enough to make people drive all the way here to get apples. You must be able to offer more."
>
> *Philips Fruit Garden*

It was pointed out that consumer engagement is particularly important if the consumer is required to make an effort in order to buy on-site, and to encourage return visits. For example, in Baden-Württemberg the ministry has encouraged farmers to open their farms to the public once a week and answer questions from visitors about how their farm operates. In addition to visits/tours where consumers can learn about farm products and their cultivation/production, some producers also allow consumers to pick the produce themselves and provide meeting rooms and onsite accommodation. These options allow consumers to immerse themselves in the farm experience. Consumer engagement can also be organised on a larger scale with festivals and events celebrating SFSC/local food, which also provide opportunities to educate and raise awareness on a more widespread level.

Agritourism was suggested by one stakeholder to be particularly conducive to educating consumers about SFSC, as the context of travel allows consumers to be more relaxed, have more time to listen, and be more open to new experiences and new ways of consumption. The profile of agritourism has been raised in Greece with the support of government initiatives such as the "Greek Breakfast" award/certificate and public-private initiatives such as the Cretan "We do Local" [see the table of initiatives in Section 4.4 for more details].

Because making dishes from local ingredients can be more effortful from consumers than purchasing ready-made meals from longer supply chains, some consumers may prefer to consume local products in restaurants rather than at home. If a producer cannot put a product on a market because of low consumer demand, it may be that a chef can transform it to make it more attractive to consumers (in addition to communicating the story behind the product). Indeed, restaurants could also help to influence social norms surrounding local food, as they can play an important role in making eating patterns more environmentally sustainable.[34]

3.6 Summary of key findings about communication and marketing strategies for increasing consumer purchases of SFSC products

- The social impact of SFSC needs to be better communicated to consumers
  - Because they have relatively little knowledge about it
  - Because they value this aspect with regards to their local community
- Governments at all levels have an important role in communicating about SFSC
- Communication also needs to target consumer expectations about the range of food available locally and the seasonality of produce
- Different consumer segments should be targeted differently
  - Those who care about transparency should be provided with information about origin, production and processing methods
  - Other consumers may be better engaged with a story telling approach
- Market research is required to find out who the relevant target groups are, and what their preferences and concerns are
  - This can inform engagement activities to maintain consumer interest in SFSC

[34] Bianchi, F., Garnett, E., Dorsel, C., Aveyard, P., & Jebb, S. A. (2018). Restructuring physical micro-environments to reduce the demand for meat: a systematic review and qualitative comparative analysis. The Lancet Planetary Health, 2(9), e384-e397.

3.7 Conclusions

Many consumers value local food for their health and environmental benefits, the support that it provides to their local community, and a preference for traditional tastes and shopping lifestyle. However, the main barriers of price and inconvenience make it difficult for consumers to purchase local food on a wider scale. Furthermore, the attributes that consumers value about local food can also be found via other means, for example, by purchasing non-local food that is organic or sold by their local grocer.

Strategies to minimise the practical barriers to purchasing from SFSC include justifying the price of local products, such as through selective taxation to reduce the price discrepancies between long and short food supply chain products, certification and explaining the benefits of SFSC to consumers. Inconvenience can be decreased by having a wider range of SFSC products in retail outlets, increasing points of sale, and making local food more available at restaurants.

Communication and marketing strategies should be based on market research identifying the target audience/s and their values and concerns. At a more general level, attributes that consumers care about, such as taste, freshness, and naturalness should be highlighted. How information about SFSC and their products is communicated may also greatly influence consumers' receptivity to it. Emphasising a producer's struggles and successes may have a greater emotional impact, and therefore be more engaging, than an informational approach that describes the profile of a local product.

4. Appendix

4.1 Descriptions of the stakeholder organisations interviewed

Region	Stakeholder	Stakeholder type/s represented	Description
EU	European Network for Rural Development (ENRD)	Policy	The European Network for Rural Development (ENRD) was launched in October 2008, to act as a focal point for all rural development actors across the EU. In particular, the ENRD helps ensure that Member States efficiently implement Rural Development Programmes (RDPs).
	Slow Food International	Producer, consumer, retailers, HoReCa	Slow Food is a global grassroots organisation, founded in 1989 to prevent the disappearance of local food cultures and traditions, counteract the rise of fast life and combat people's dwindling interest in the food they eat, where it comes from and how our food choices affect the world around us.
DE	Consumer Advice Center Baden-Württemberg e.V.	Consumer	The German consumer advice centres are associations organised at state level which, on the basis of a government mandate, are dedicated to consumer protection and provide advisory services.
	State Parliament of Baden-Württemberg	Policy	Interviewee is a member of the State Parliament of Baden-Württemberg, who has special expertise in rural areas.
	State Parliament of Hessen (Bündnis 90/Die Grüne party)	Policy	Member of the State Parliament of Hessen, who has a special expertise in agriculture, animal welfare and hunting. Bündnis 90/Die Grünen is a political party in Germany. The main focus is on environmental policy. The guiding principle of "green policy" is ecological, economic and social sustainability.
	Kaemena Farm	Producer, service	A dairy farm with cattle farming as the basis of the farm. In addition, the farm owner offers five holiday apartments and sells ice-cream.
	Regionalfenster (Regional window) GmbH	Certifier	Regionalfenster Service GmbH organises the testing and security system and grants licences for the regional window to companies in the agricultural and food industries. The symbol "Regional window" shows you where the product comes from (origin of the main ingredient(s), the main places of processing, etc.).
NL	Organic Farm Landzicht	Producer, consumer	Landzicht is an organic farm which sells their products to consumers via subscription. This farm is focused on cohesion/balance between earth, plants, animals and human beings. That is why they pay attention to all aspects of life on their farm.
	Philips Fruit Garden	Producer, retailer, HoReCa	Established nearly 90 years ago, the Philips Fruit Garden supplies healthy fruit from its apple, pear and plum orchard. The modern pancake house on the site, De Proeftuin, serves pancakes, while the farm shop (*Landwinkel*) sells apples and pears from the orchard, together with a wide range of artisan products from the local area.
	Sustainable Agriculture team from Province South-Holland	Policy	The Sustainable Agriculture team of the province of South-Holland is involved in the goal of the province to develop a sustainable agricultural- and food policy. The overall goal of province South-Holland is smarter, cleaner and stronger.
	Wageningen University & Research (WUR)	Policy	Interviewee is a researcher at Wageningen University with a special focus in short chains and policy advisor for province South-Holland. WUR is a collaboration of different research institutes and the university, focused on various natural, technological and social disciplines.
	Province Utrecht	Policy	Interviewee is part of team line of defense expert team. They stimulate redevelopment in different areas: restauration, nature conservation, energy, marketing etc. Province Utrecht is focused on a

			balance between nature, agriculture, water, culture history, landscape and recreation.
	Mariënwaerdt	Producer, HoReCa	Mariënwaerdt is an old family estate with a shop, in which they sell products produced at the estate, a restaurant, a fair, hotel/B&B and it is often used as a location for different events.
CH	Slow Food Switzerland	Producer, consumer, retailer	Slow Food is committed to biodiversity, advocates for sustainable food production and respects the environment and invests in taste training; quality food producers and consumers in the context of events and initiatives. Slow Food has approximately 100,000 members worldwide. Slow Food Switzerland has about 4,000 members, and the organisation is supported by a growing number of friends in the form of donations and voluntary help.
	University of Neuchâtel	Policy	The focus of the interviewee’s research is the complex relationships between production, processing, trade and food consumption, and their political, economic and environmental issues.
	French Federation of Contractual Agriculture of Proximity	Producer, consumer	Since 2008, the Fédération Romande d'Agriculture Contractuelle de Proximité (FRACP) has brought together the agricultures of French-speaking Switzerland. Their missions are to strengthen short food supply chain links, sharing knowledge, supporting the new short food suppliers, and raising awareness and building the short food supply model with the public and political authorities.
HU	Csoroszlya Farm Kft.	Producer	Organic producers who sell to restaurants (fine dining) and on 4 farmers’ markets (vegetable, potato)
	Chamber of Tourism	Producer	Group of producers who sell together in rural areas by own shop and markets
	Calvary Farm	Producer	Pig meat producer as a farmer; Organizer of the “My Basket Customer Community” http://enkosaram.hu/page/homepage
	Cooperating Balaton Upland	Service	Association, performs expert activities for preserving the local values. Leader Local Action Group of Hungary
	Upper-Heathland Rural Development Association	Service	Leader Local Action Group of Hungary
	National Food Chain Safety Authority, Food and Feed Safety Directorate	Regulatory authority	Food Authority of Hungary
	Pannon Helyi Termék Nonprofit Kft.	Service	Local Product Nonprofit Organisation of Hungary. One of the first SFSC coordinators in Hungary, established in 2005.
	Research Institute of Agricultural Economics, Office Budapest	Policy	Small Scale Manufacturers Interest Representation
EL	BIOZO	Consumer	BIOZO – Bio-Consumer for a qualitative life – was founded on 23 September 2003 as a Consumers Association. The main goal of BIOZO is to mobilize and organize consumers in a dynamic Association with active presence and everyday action/involvement in local, national and international levels in order to protect and improve consumers' social and financial interests, contribute to food health and security, upgrade and improve consumers' quality of life.
	Ecotourism Greece	Service	Ecotourism Greece is a platform devoted to alternative and ecological tourism in Greece
	GENISEA Social Cooperative Enterprise	Producer	Genisea Koinsep is a womens' social-agricultural co-operative that produces and markets treacle from sugar cane.
	Hellenic Agticultural Organisation-Demeter/ Ministry of Rural Development and Food	Policy/regulatory authority	Interviewee is a food scientist and agricultural economist/ Hellenic Agricultural Organisation-Demeter/ Ministry of Rural Development and Food.
ES	(ENEEK) Basque Council for Ecological Agriculture and Food	Regulatory authority	ENEEK certifies organic production (organic production labels), and promote and distribute organic production in the Autonomous Community of the Basque Country. They support the commercialisation of very small, rural farms (1-2 people, families), and carry out

			initiatives such as setting up markets, fairs, and purchasing communal materials.
	European Coordination Vía Campesina	Producer	The European Coordination Via Campesina is a European grassroots organisation which currently gathers 31 national and regional farmers, farm workers and rural organisations based in 21 European countries. Rooted in the right to Food Sovereignty, their main objective is the defence of farmers' and field workers' rights as well as the promotion of diverse and sustainable family and peasant farming.
	AUSOLAN	HoReCa	The main business areas of AUSOLAN are aimed at the areas of catering and cleaning to communities: schools, businesses, health institutions and centers for the elderly. They are currently present throughout Spain. They have 17 offices and 16 central kitchens, which position this business group within the top three catering companies in Spain. They have started to expand into the international market, starting in Europe (France) and Latin America (Chile).
BE	Ghent Environment and Climate Bureau (Ghent Municipality)	Policy maker	The Ghent Environment and Climate Bureau oversees Ghent's urban food policy, "Ghent en Garde", which won a United Nations Global Climate Action Award in 2019. Ghent en Garde aims to strengthen short food supply chains in the city, while increasing sustainable production and consumption. According to the UN, the project demonstrates the potential to transform food systems at the local level.

4.2 Project information sheet and informed consent form

Project Information Sheet

This interview is part of SMARTCHAIN –Towards innovation-driven and smart solutions in short food supply chains – a European research project funded by the European Union's Horizon 2020 research and innovation programme under Grant Agreement No. 773785.

Guarantee of privacy and anonymity

You have the right to withdraw from the interview at any given time, without having to justify your decision. We will ask you to give your consent before we start the interview. The entire interview will be recorded with your permission, but all results will be presented in an anonymous way. Your name will not appear in any written report. Your data will be stored at **[name of partner institution]**, and will only be accessed by **[name of the same institution]**. If you wish to withdraw your consent or exercise any other data protection rights related to the interview, please contact **[name of contact person and their email address]**.

SMARTCHAIN – the project

The central objective of this project is to promote participation in collaborative short food supply chains and to introduce new robust business models and practical solutions that enhance the competitiveness and sustainability of the European agri-food system.

Objective of this interview

We want to better understand food supply chain mechanisms, the specificities recovered in shortening these, challenges and opportunities for short supply chains and perceived consumer acceptance.

Background Information

A short food supply chain involves "a limited number of economic operators, committed to cooperation, local economic development, and close geographical and social relations between food producers, processors and consumers." Source: REGULATION (EC) No 1305/2013. However, consumers may more readily conceive of short food supply chains in terms of supplying 'local food'.

Informed Consent

Project Name:	SMARTCHAIN - Towards innovation-driven and smart solutions in short food supply chains
Grant Agreement no.:	773785
Start date of the project:	September 2018
End date of the project:	September 2021
Financed by:	EU Horizon 2020 research and innovation programme
Website:	http://www.smartchain-h2020.eu/

I agree to take part in the above research project. I have had the project explained to me and I am happy with the information provided and have received a project information sheet. I have had the chance to ask questions about the project.

I understand that agreeing to take part means that I am willing to:

- Participate in the SMARTCHAIN project, in the Task 4.1.2.
- Participate in an interview

I understand that any information I provide is confidential and that no information that I disclose will lead to the identification of any individual in the reports on the project, either by the researcher or by any other party. However, I also understand that comments that I make may be quoted anonymously as part of the publications of the project and may state my position in the supply chain (e.g. producer, consumer, processor, retailer, consultant, or researcher).

I understand that my participation is voluntary, that I can choose not to participate in part or all of the project, and that I can withdraw at any stage of the project without being penalized or disadvantaged in any way.

I consent to the processing of my personal information for the purposes of this research study. I understand that such information will be treated as strictly confidential and handled in accordance with the EU General Data Protection Regulation (GDPR).

Name:

Signature:

Date:

4.3 Table of problems and solutions related to consumer engagement with short food supply chains

Problem	Solution
Consumers lack awareness of the social and environmental impact of food production	Environmental awareness courses as part of the standard school curriculum.
	The social impact of food production should be communicated at the local level, as this is likely to instil a greater sense of personal relevance for the consumer.
	Presenting information about the impact of food production in a storytelling format.
Consumers would like to have the same types of (year-round) products as in supermarkets	Educating consumers that aesthetically compromised produce is still good quality, and that the demand for cosmetically perfect fruit and vegetables is harmful to the environment.
Consumers expect low prices on SFSC products	To eliminate value-added tax (VAT) for direct selling.
	To implement a tax that takes into account the hidden costs of food in terms of its environmental and/or health impact. This could be in the form of true pricing or a scheme that decreases the rate of tax for labour, but increases it for the cost of resources.
	Presenting information about the benefits of buying SFSC in a story-telling format. In this way, the conversation surrounding food choice becomes less about price and more about impact.
Buying local food is inconvenient for consumers	Increase points of sale - e.g. supermarkets, restaurants.
	Producers could provide delivery to consumers or engage with distributers.
	Producers could form cooperatives to offer a greater variety of food at the one retail outlet.
Fraud in SFSC	Have a certified quality label/scheme for local food
	Trying to find harmony between the different certifiers/schemes
	Regulation of SFSC
	Traceability could be communicated to the consumer via QR codes on the product that allows access to information about the origin of the product, production method, nutritional information, carbon impact, etc.
	Independent monitoring to safeguard consumers against deceptive practices.
Consumers need help identifying local/SFSC products	Have a certified quality label/scheme for local food.
Consumers are concerned about food hygiene and safety	Educating SFSC producers about food safety regulations and making it easier for them to be certified.
Need to increase sales of SFSC products	More points of sale are needed to drive consumer demand
	Restaurants could influence social norms surrounding local food, as they can play an important role in making eating patterns more environmentally sustainable.
	Local products need additional selling points, such as their quality, to appeal to consumers.
	Engaging consumers by presenting them with information about local producers in a storytelling format.

	SFSC producers should highlight the naturalness of their product, while explaining what it is about their product that makes it 'natural' (e.g., cultivation method, minimal processing, no additives).
	Festivals and events celebrating SFSC/local food.
	If a producer cannot put a product on a market because of low consumer demand, a chef could transform it to make it more attractive to consumers
	Communication campaigns, especially from government bodies
Consumers of a lower SES are less likely to purchase local foods	Discount supermarkets should attract regional suppliers and label regional products. If SFSC products can be made accessible to consumers under these business models, then more consumers would purchase such products.
Producers need information about the market	Producers need to conduct their own market research to find out what the consumer wants, and/or what type of consumer is more likely to buy their particular type of product.
Producers need to increase their marketing	Different SFSC producers could pool their marketing resources together (e.g., sharing a library of images, marketing templates), or such resources could be provided by organisations supporting SFSC or rural development.
	Low-cost marketing to consumers can occur via social media platforms such as Facebook and LinkedIn.

4.4 Table of initiatives related to short food supply chains

Region	Name of initiative (English)	Name of initiative (original language)	Type of initiative	Description	Website
EU	SALSA - Safe and Local Supplier Approval	SALSA - Safe and Local Supplier Approval	Labelling/certification	SALSA is a food-safety standard written by experienced food safety experts to reflect both the legal requirements of producers and the enhanced expectations of 'best practice' of professional food buyers. SALSA certification is only granted to suppliers who are able to demonstrate to an auditor that they are able to produce safe and legal food and are committed to continually meeting the requirements of the SALSA standard.	https://www.ifst.org/accreditation-schemes/safe
	Earth Markets	Earth Markets	Farmers markets	Earth Markets are farmers' markets that have been established according to guidelines that follow the Slow Food philosophy. These community-run markets are important social meeting points, where local producers offer healthy, quality food directly to consumers at fair prices and guarantee environmentally sustainable methods. In addition, they preserve the food culture of the local community and contribute to defending biodiversity.	https://www.fondazioneslowfood.com/en/what-we-do/earth-markets/
	Slow Food Youth Network	Slow Food Youth Network	Network	The Slow Food Youth Network (SFYN) is a worldwide network of young people creating a better future through food. It unites groups of young food enthusiasts, chefs, activists, students and food producers who participate in public debate about current issues and introduce young people to the world of gastronomy. Through their events and activities, SFYN groups raise awareness about important food issues such as how to feed the world, food waste and sustainable food production.	https://www.slowfood.com/our-network/slow-food-youth-network/
	Terra Madre	Terra Madre	Network	Terra Madre is a free network spread across 150 countries. Terra Madre is a project conceived by Slow Food. Since Slow Food was founded, the importance of protecting and supporting small-scale producers has become increasingly clear. Terra Madre was born to give them voice and visibility, to raise awareness of the true value of their work, and provide them with the tools needed to be able to work in better conditions.	https://www.terramadre.info/en/
	Slow Food Presidia	Slow Food Presidia	Organisation	The Presidia sustain quality production at risk of extinction, protect unique regions and ecosystems, recover traditional processing methods, safeguard native breeds and local plant varieties. Today, more than 500 Presidia involve more than 13,000 producers.	https://www.fondazioneslowfood.com/en/what-we-do/slow-food-presidia/

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 773785

	Salone de Gusto Terra Madre	Salone de Gusto Terra Madre	Exposition	Organised by Slow Food, the Region of Piedmont and the City of Turin, Terra Madre Salone del Gusto is an international gastronomy exhibition that takes places every two years in Turin, bringing together food producers and artisans from across the world. The event is composed of a large market and other activities including conferences, forums, workshops, tastings and cooking lessons.	http://salonedelgusto.com/en/index.html
	Slow Cheese	Slow Cheese	Network	Slow Food is working to save the diversity of artisanal cheeses, which could easily disappear under the pressure of industry, market, and restrictive food safety regulations that are ill suited to the needs of small-scale producers. The Slow Cheese network was founded in order to activate thousands of activists; to propose legislative changes, to support producers facing difficulties in different countries, to share experiences and knowledge.	https://www.slowfood.com/what-we-do/themes/slow-cheese/
	Slow Fish	Slow Fish	Network	The international Slow Fish campaign promotes small-scale fishing and responsible fish consumption. They work to inform people about the richness and fragility of the marine world so that consumers can widen their choices beyond the most popular – and often overfished – species. The campaign invites consumers, chefs, academics and fishers to find local solutions that support better management of the sea's resources.	https://www.slowfood.com/slowfish/
	Slow Food School Gardens	Slow Food School Gardens	Education	As an educational organisation, Slow Food has the task of teaching how to revalue food and the people who produce it. One of the simplest ways to do this is to engage children in the process of growing and preparing some of their own food.	https://www.slowfood.com/school-gardens-starting-in-bra/
	Slow Food Cooks/Chefs Alliance	Slow Food Cooks/Chefs Alliance	Network	A network of more than 400 cooks defending food biodiversity across the world. The cooks support small producers by using products from Presidia projects and the Ark of Taste, as well as local fruits, vegetables and cheeses, in their kitchens. The cooks are requested to add the names of the producers to their menus, to give visibility to their work. The Alliance Cooks travel, meet with one another, participate in events and cook together.	https://www.fondazioneslowfood.com/en/what-we-do/slow-food-chefs-alliance/
DE	Fom Home BW	Von Daheim BW	Campaign	Campaign to promote local food in Baden-Württemberg, conducted by the Baden-Württemberg Ministry of Rural Affairs and Consumer Protection	https://von-daheim.de/
	From Home	Von Daheim	App	From Home BW' is an app that allows consumers to find local food and their producers in the Baden-Württemberg region.	https://mlr.baden-wuerttemberg.de/de/unsere-themen/landwirtschaft/regionale-landwirtschaft/kampagne-natuerlich-von-daheim/

Funding Programme for Environment, Climate Protection and Animal Welfare Baden-Württemberg	Förderprogramm für Agrarumwelt, Klimaschutz und Tierwohl (FAKT)	Funding programme	Support programme in the Baden-Württemberg region were regional farmers are rewarded/subsudied for producing and keeping their agricultural products in an environmentally friendly way and respecting the species-approriate agriculture. Thank to the measures offerede by the program, farmers can meet the main expectations of consumers (e.g. regionality, organic) while preservating the cultural landscape, natural resources like water and soil, along with the conservation of the species diversity.	https://mlr.baden-wuerttemberg.de/fileadmin/redaktion/m-mlr/intern/dateien/publikationen/Landwirtschaft/2018_Fakt_Funding_programme_for_environment.pdf
Rural development programme	Entwicklungsprogramm Ländlicher Raum (ELR)	Programme	Support programme in the Baden-Württemberg region where regional farmers are rewarded/subsidized for producing and keeping their agricultural products in an environmentally friendly way and respecting the species-appropriate agriculture. Thanks to the measures offered by the program, farmers can meet the main expectations of consumers (e.g. regionality, organic) while preserving the cultural landscape, natural resources like water and soil, along with the conservation of the species diversity.	https://www.euro-access.eu/calls/rural_development_baden-wuerttemberg_2014-2020 https://rp.baden-wuerttemberg.de/themen/land/elr/seiten/default.aspx
Association of Hessian Direct Marketers	Vereinigung der Hessischen Direktvermarkter e.V. (VHD)	Organisation/ network	Umbrella organization of agricultural marketers (local food distributors) in Hesse. They offer a wide range of self-produce products from more than 300 direct-marketing farms. It offers a direct and transparent connection of primary agricultural production, processing and marketing where farmers are responsible from the product from the beginning until it is in the sales counter.	https://hessische-direktvermarkter.de/
Good thing from Hessen	Gutes aus Hessen (MGH)	Labelling/certification	The company MGH Gutes sud Hessen GmbH was assigned by the Hessian Government to market the Hessian agriculture and food industry. Its work includes managing activities related to food marketing like fairs, exhibitions, retail tasting events as measures like quality and provenance labels. The Gutes aus Hessen is a label that guarantee that the original product and the processing took place in Hessen. They are currently working on a project for the implementation of the Organic Seal - Hessen (Bio-Siegel - Hessen).	https://www.gutes-aus-hessen.de/startseite.html
Organic City of Bremen	BioStadt Bremen	Campaign/Organisation/ network	Initiative created in 2015 for the Climate Protection, Environment, Mobility, Urban Development and Housing. Their main goal is to promote organic and locally produced food "More organic from and for Bremen". They aim to increase the share of regional organic products in commerce, manufacturing,	https://www.biostadt.bremen.de/

				agriculture and hospitality, promote conscious nutrition, support tourism and connect the multitude of dedicated stakeholders. They suggest that associations and projects should be networking to promote the regional food industry and raise awareness of the benefits of organic food.	
	Rechstreex (Directly)	Rechstreex	Online platform supplying local food to consumers	Rechstreex offer online shopping of products from local farmers and collection at a pickup point in customer neighbourhood. They have direct contact with the farmers and invite consumers to be part of the "most direct, local, fair and social food system possible". In the website, consumers can find information of the supplier they are buying from.	https://www.rechtstreex.nl/
CH	Slow Food Travel		Agritourism	Slow Food Travel offers a new model for tourism, made up of meetings and exchanges with farmers, cheesemakers, herders, butchers, bakers and winegrowers who, along with the chefs who cook their products, will be the narrators of their local areas and unique guides to the local traditions.	https://www.fondazioneslowfood.com/en/what-we-do/slow-food-travel/
	Slow Cheese		Awareness campaign, events	Slow Food is working to save the diversity of artisanal cheeses, which could easily disappear under the pressure of industry, market, and restrictive food safety regulations that are ill suited to the needs of small-scale producers. The Slow Cheese network was founded in order to activate thousands of activists; to propose legislative changes, to support producers facing difficulties in different countries, to share experiences and knowledge.	https://www.slowfood.com/what-we-do/themes/slow-cheese/
	Slow Fish		Awareness campaign, events	The international Slow Fish campaign promotes small-scale fishing and responsible fish consumption. They work to inform people about the richness and fragility of the marine world so that consumers can widen their choices beyond the most popular – and often overfished – species. The campaign invites consumers, chefs, academics and fishers to find local solutions that support better management of the sea's resources.	https://www.slowfood.com/slowfish/
	Fédération Romande d'Agriculture de Proximité (FRACP)		Federation of Community Supported Agriculture	Federation of Community Supported Agriculture projects in the French-speaking part of Switzerland.	https://www.fracp.ch/accueil/
	Genéve Région Terre Avenir		Label	A label for local products from the Geneve region.	https://www.geneveterroir-plateforme-grta.ch/

	Sustainable Collective Catering Plan	Plan de restauration collective durable (RCD)	Public and private procurement plan	A sustainable public and private procurement plan implemented by the City Council of Lausanne.	http://www.lausanne.ch/en/thematiques/developpement-durable/ville-durable/consommaction/politique-alimentaire/restauration-collective-durable.html
	La Touvière		Education	A farm which can be visited by schools classes to learn more about production of the locally grown foods.	https://www.touviere.ch/
	Les Chemins du Bio		Education / travel	Offers a tour to visit local farms.	https://www.cbio.ch/
	TransGourmet		Distribution	Distributes a line of local products 'Transgourmet Origine' to HoReCa in Switzerland, France, Germany and Austria	https://www.transgourmet.fr/ http://www.transgourmet-origine.fr/
HU	Local Product Year (2015)	Helyi termék: Helyből jobb	Awareness campaign	Hungarian national campaign to familiarise consumers with local products.	http://www.helyboljobb.hu/
EL	Greek Breakfast	Ellinikó Proinó	Agritourist cooperative	Initiative managed by the Hellenic Chamber of Hotels that offers local products and regional specialties to hotel guests. It connects the local gastronomy of the country with the hotel business.	www.greekbreakfast.gr
	We do local	We do local	Labelling/certification	Business certification standard (logo) that certifies that a business supports the local production, economy and workforce; promote their local cuisine and local producers; respect the environment and the sustainability of their homeland. It intends to support companies that follow this business approach.	www.wedolocal.gr/
	Ecotourism Greece		Tourism, Labelling/certification, Network	Platform (website) that promotes sustainable tourism businesses, creating a network of eco-friendly members. The activities offered in the website go from accommodation (green hotels) to tours of different types (e.g. archaeological, gastronomic) in different regions of the country.	https://ecotourism-greece.com/home/
	Aegean Cuisine		Agritourism / Experience	Network of member-business from the Aegean islands that promote enogastronomy, offer local products and promote thematic tourism in the islands.	www.aegeancuisine.org/
	Wine Roads of Northern Greece		Agritourism	Wine Producers Association is a not-for-profit non-stock corporation. Thirty-three wineries are part of this association building up the image of the wines of the region and promoting it abroad. They offer wine tourism, support Greece's	www.wineroads.gr/en/wine-routes/wine-roads-of-northern-greece-wine-routes

				cultural heritage and participate in the formulation of general rules related to the relations between growers, wine-makers and wine merchants.	
	Thessaloniki American Farm School		Education	Independent, non-profit educational institution that offers students from rural regions an education in agriculture and the life sciences.	https://www.afs.edu.gr/
	Framework to regulate Agrotourism Businesses		Policy	Regulation developed by the Tourism Ministry and the Rural Development and Food Ministry that aims to standardise and improve the quality of services. Some of the measurements are: give businesses an activity code to support a regulated activity and introduce the requirements for the mandatory Special Agritourism Seal (ESA). These requirements include being signed-up in the Greek farmer's registry and to offer up to 40 beds on or off farm or agricultural locations.	https://news.gtp.gr/2018/08/03/greece-new-framework-regulate-agrotourism-businesses/
ES	Sareko		Network	An initiative that works to connect local organic food producers and the professional hospitality sector. It is endorsed by ENEEK and Biolur.	https://www.sareko.eus/
BE	BelgoMarkt	BelgoMarkt	Local food supermarket	Urban supermarket in Brussels selling a wide range of products, 95% of which are sourced from SFSC. Their objective is to make sustainable products more accessible and affordable.	http://belgomarkt.be/
	Vanier	Vanier	Online platform supplying local food to HoReCa	An online marketplace where catering professionals or traders can purchase local food products directly from farmers and other food producers from Ghent and the surrounding area.	https://www.vanier.gent/
	In short, Leuven	Kort'om Leuven	Online platform supplying local food to HoReCa	Kort'om Leuven is setting up a local platform that will serve as a turntable for distribution of local agricultural products to large customers in Leuven and the surrounding area. They strive for a rich diversity in supply (both common and organic products) and in catering, retailers, neighbourhood shops, supermarkets, etc. to match offers. The platform will enable an efficient and sustainable distribution in and to the city.	https://www.rikolto.be/nl/kortom
	Ghent en Garde	Gent en Garde	Urban food policy	The urban food policy of the Municipality of Ghent. Ghent en Garde won an United Nations Global Climate Action Award in 2019. It aims to strengthen short food supply chains in the city, while increasing sustainable production and consumption.	https://stad.gent/en/city-policy-structure/food-strategy-ghent/food-strategy-ghent-gent-en-garde